



## MARS Reporting & Querying "Business User" Guide

For the Business and Power User

Navigation / Working with Corporate Documents

https://mars.rdc.noaa.gov



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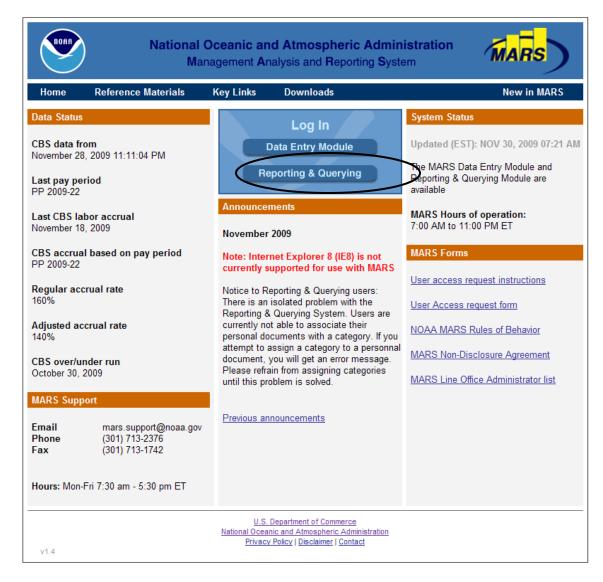
### **Terminology**

- Business Objects 4.1™ This is the release of Business Objects being used by NOAA for MARS Reporting & Querying Module as of December 2014.
- Launch Pad— This is the web component of Business Objects 4.1 that provides access to Web Intelligence documents. It also allows access to other documents such as MS Excel, MS PowerPoint and PDF. Launch Pad also allows the creation of HTML links for easy navigation to other web applications. Launch Pad allows you to organize these documents to suit your personal preferences.
- Web Intelligence (Webl) This is the Business Objects 4.1 web application for building both corporate and personal documents.
- **Data Warehouse** A data warehouse is a central database for consolidating data from different systems throughout the organization. The data warehouse is specifically architected for easy querying and reporting. The MARS Data Warehouse (MARS DW) resides on an Oracle platform at the NOAA ITC in Largo, MD.
- **Document** A document contains one or more reports & queries. If there is more than one query, the queries must be related and linked together by common elements. The results of the query or queries is then presented in one or more report tabs. A document that is published by the MARS team for public use is called a <u>Corporate</u> or <u>Public</u> document. Documents that are created by an Adhoc user are called <u>Personal Documents</u>.
- **Object** In Business Objects, the objects are the building blocks for the report. Objects are organized in folders within a Universe (see below). An object can be a data column such as 'Project Code', or it can be a query filter such as 'Include Labor Only".
- Report Tab A document can have more than one report tabs. Report Tabs are used to show the results of the query in different ways, such as a summary and detail tab.
- Report Section Within a report tab, the report can be set up to navigate by section. For example, sections can be generated by FMC and program.
- Refresh Refresh refers to the action of running the query or queries for the document in order to get the latest data from the database to be presented in the report tabs.
- **Drill** If drilling is enabled in a document, the user has the ability to click on the higher levels to drill down to lower levels within a hierarchy, such as the Fund, Program and Project hierarchy.
- **Toggle** Toggle refers to the action of turning on and off panels within Launch Pad. Actively toggling unnecessary panels off will give the user the maximum workspace for view documents.
- Universe The universe is a collection of objects relating to a particular table or set of tables in the data warehouse.

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## Logging In

## Logging In – MARS Home Page



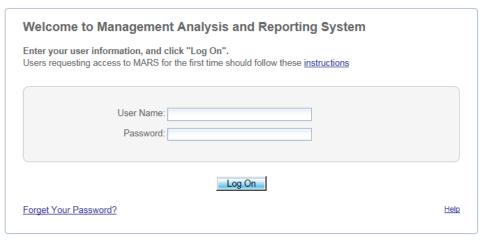
Go to this web address for the MARS Home Page:

https://mars.rdc.noaa.gov

- This page features:
  - □ Log In for
    - MARS Data Entry Module
    - MARS Reporting & Querying
  - □ Data Status
  - □ Support Information
  - □ Announcements
  - □ System Status
  - □ Forms
  - □ Reference Materials
  - □ Key Links
  - □ Downloads
  - □ New in MARS
- To log in to MARS Reporting & Querying, click the Reporting & Querying button

## Logging In - User Name & Password Screen





User passwords should adhere to the Department of Commerce Password Policy

\*\*\* You are accessing a United States Government computer system. The use of this system will be monitored for security, system administration, and law enforcement purposes. Accessing this system constitutes consent to monitoring. Any unauthorized access of this system or unauthorized use of the information on this system by unauthorized users or others is prohibited and is subject to criminal and civil penalties under federal and other laws.\*\*\*

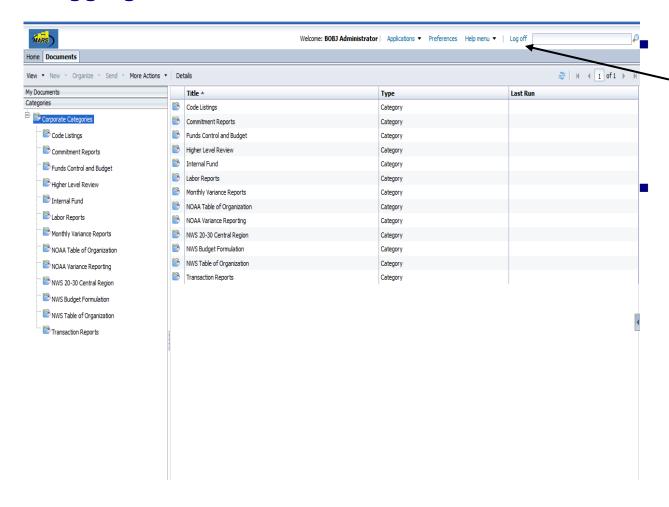
U.S. Department of Commerce

National Oceanic and Atmospheric Administration

Privacy Policy | Disclaimer | Contact

- Enter your User name & Password then click Log On.
- User names & passwords are case sensitive.
- If a password is entered incorrectly 3 times, the user account will be disabled.
- Valid passwords in Business Objects are required to:
  - □ Be at least 8 characters
  - Contain 2 of the following
    - Upper case letters
    - Lower case letters
    - Numbers
    - Punctuation(! @ # \$ %, & etc.)
  - □ Be different from your last 10 passwords
  - NOT contain any of your account name as part of your password
- If your account becomes disabled, contact MARS Support. Contact information can be found on page 32 and on the MARS Home Page.

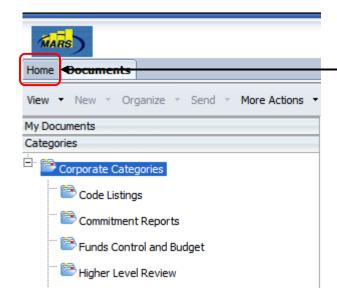
## Logging Out



When you are finished using Business objects, always log out by selecting the Log Off option from the menu bar.

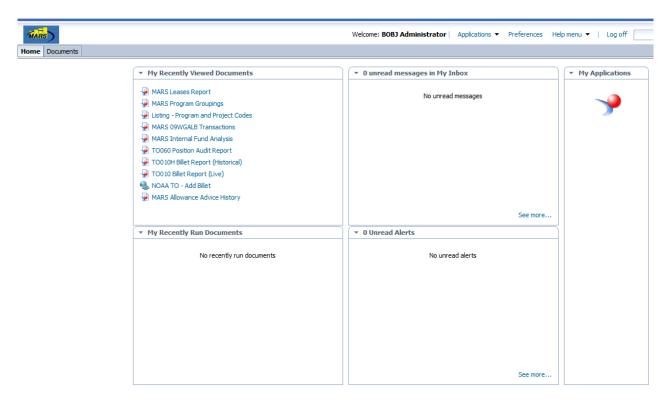
You will be brought back to the login screen after you have successfully logged out.

### Home



To view Recently Viewed
Documents, click on Home tab.

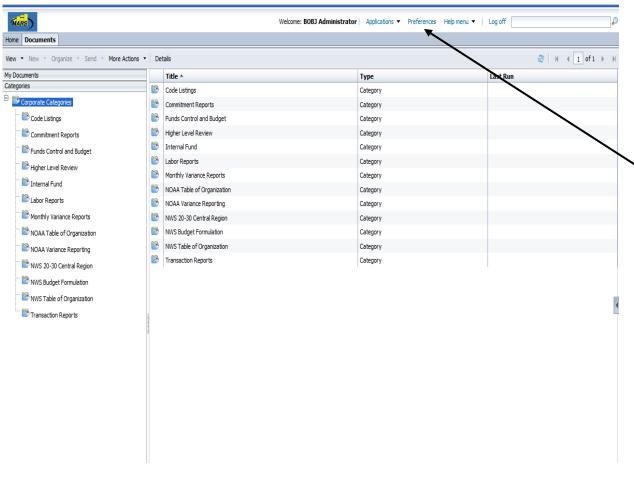
### Home



From the *Home* tab, you can also view any unread messages in your BusinessObjects *Inbox*.
Click on the *Documents* tab to go back to *Corporate*Category view

# **Setting Preferences**

## **Setting Preferences**



Preference settings allow users to your preferred Launch Pad Start Page as well as other settings to control the default functionality.

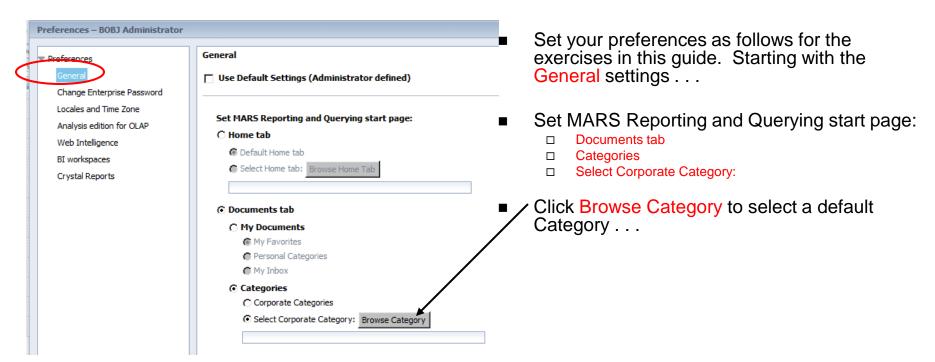
To set preferences, select the *Preferences* option.

#### **IMPORTANT NOTE:**

The following pages show how preferences should be set to match the exercises in this guide.

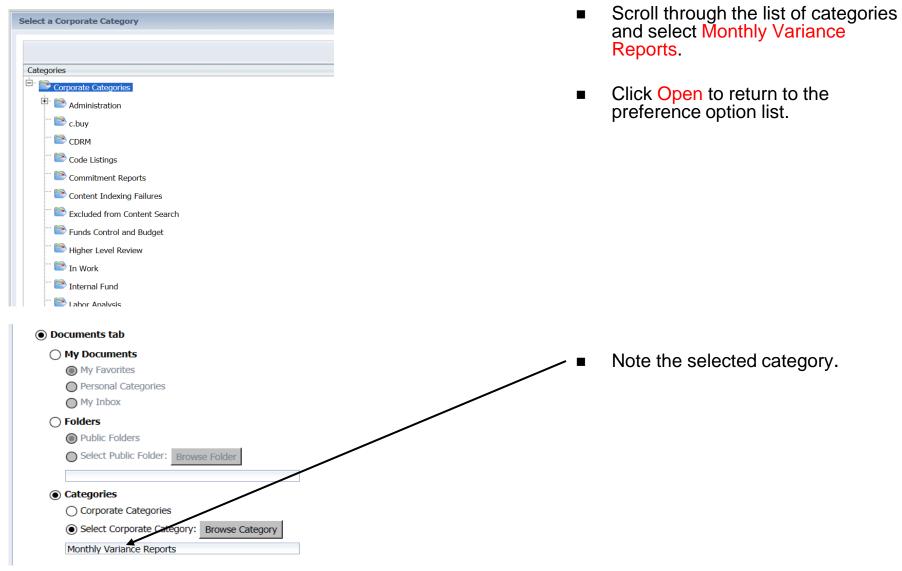
After completing the MARS Reporting & Querying User Guide, feel free to set them based on your own individual preferences.

## Setting Preferences: General Section

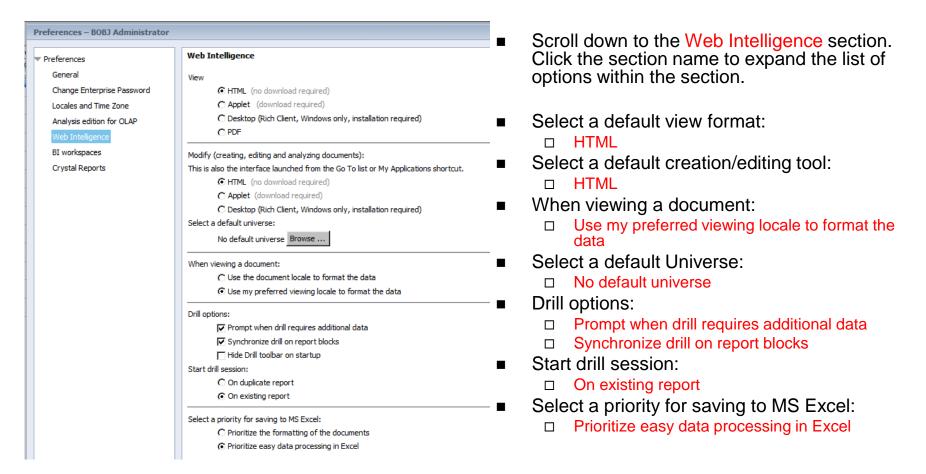


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## Setting Preferences: General Section



## Setting Preferences: Web Intelligence Section

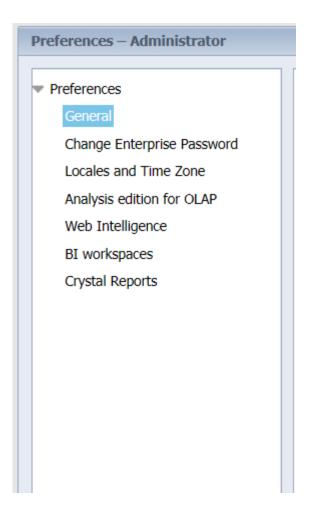


## Setting Preferences: Change Password Section



- Scroll to the Password section.
   Click the section name to expand the list of options within the section.
- As a new user, you will be asked to change your password the first time you log in.
- Subsequently, you will be asked to change your password every 60 days.
- You may change your password at any time using this screen. (There is no need to change it at this time.)

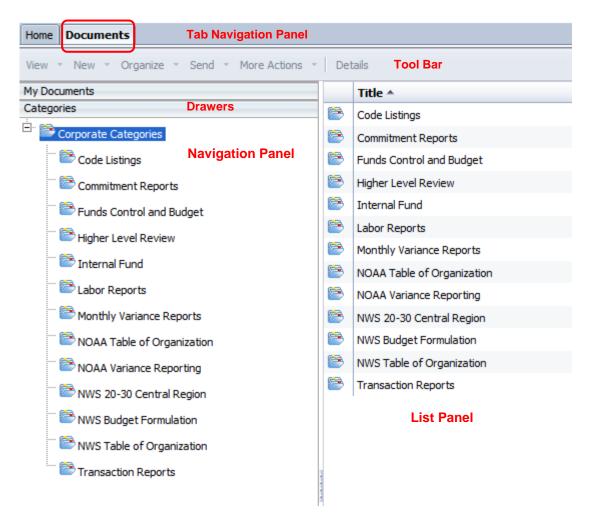
## Setting Preferences: Ignore Other Settings Sections



Please ignore the *Crystal Reports, Analysis edition* for *Olap, BI Workspaces* settings.

## **Launch Pad Navigation**

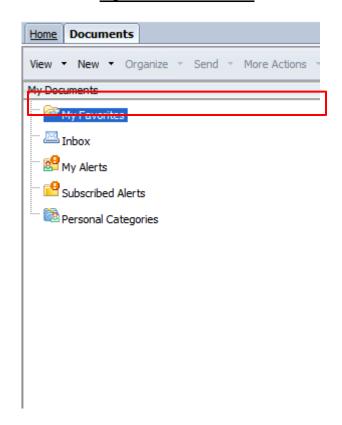
## BI Launch Pad Navigation: List Panels



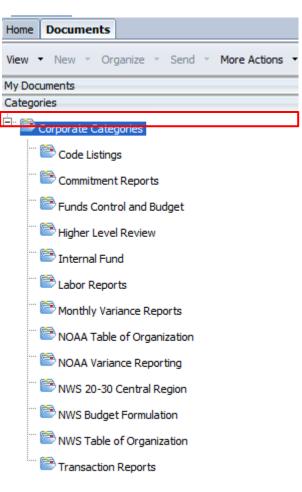
- Click the *Documents* tab to return to *Corporate Categories* view.
- Note that the screen is divided into two panels:
  - Navigation Panel
  - List Panel
- The Navigation Panel is used to browse Personal Folders & Categories, Inbox documents and Corporate Categories.
- The Navigation Panel provides a top-level view of folders and categories.
   Drawers are expandable panes on the navigation panel.
- The List Panel is where the objects within the selected folder or category are displayed.
- The *Tool Bar* is only available when the Navigation and List panel are displayed. It is used to view and manage objects.
- The *Tab Navigation Panel* on top is always displayed.

## Launch Pad Navigation:

#### My Documents View



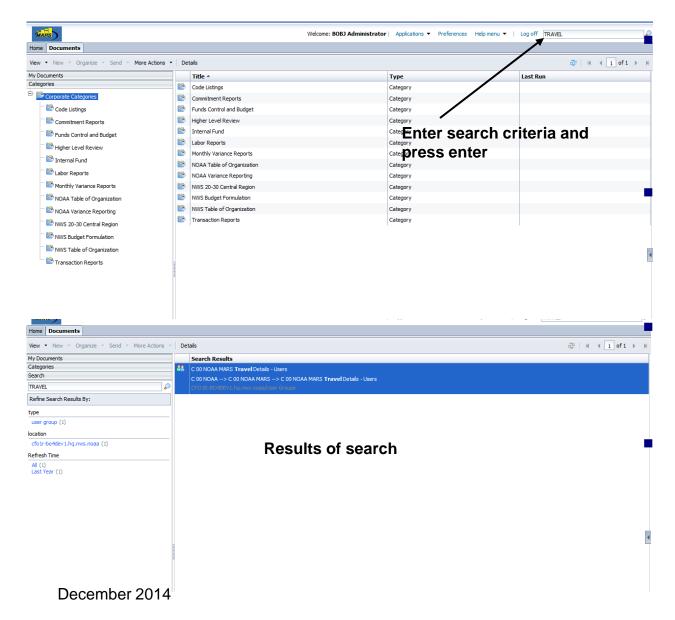
#### **Categories View**



- Each document must be placed in a folder.
- Each document can be associated with zero, one or more categories.
- MARS has been configured to show Corporate Documents only in the Category View. Switch to Category View to see Corporate Documents.
- Personal Categories will be empty if you have not created your own categories. Switch to My
  Documents View to see Personal Documents
- The My Documents view is the only way to navigate to the Inbox.
- Practice toggling between the My Documents and Categories views.

NOTE: You may not see some categories shown in these screenshots due to individual access rights

## Launch Pad Navigation: Finding Documents by Name



If you are looking for a particular document and are having trouble finding it in either the folder or category structure, use the *Document Search* facility in the *Launch Pad Tool Bar*.

For example, if you are looking for a document you know has 'Travel' in the name, simply type 'Travel' in the search field and press enter.

Matches to search text are automatically based on object's keyword, title, description, content, owner information

Click a facet in the **Search** drawer to refine the results.

## Launch Pad Navigation: Menu Bars - Quick Reference

#### Main Menu Bar



- 1. Home: Go to Launch Pad Start Page as defined in your preferences
- 2. Documents: Display the document list you were last viewing
- 3. Applications: Used to open SAP applications
- **4. Preferences:** Preference allows users to set their preferred Launch Pad Start Page as well as other settings to control the default functionality.
- **5. Help menu:** Access on-line help (this help does not cover in-depth report creation)
- 6. Log Off
- 7. Search: Search for a document by title or keyword

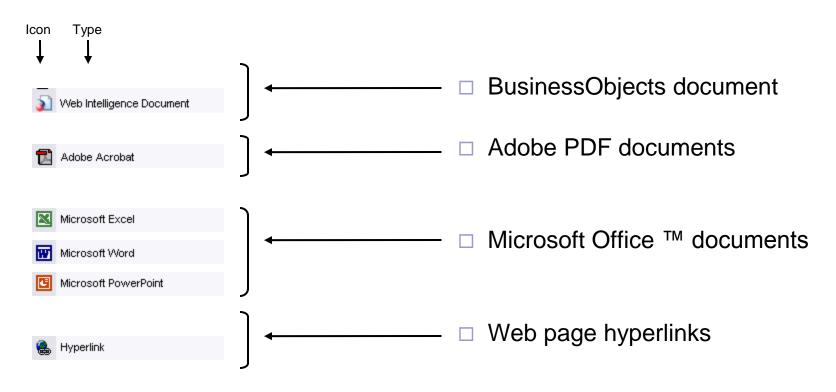
#### **Launch Pad Menu Bar**



- 1. View: Open a selected report for viewing or displays report properties.
- 2. New: Create Category or Folder
- 3. Organize: Cut, copy, copy shortcut, paste or delete Personal Folder, Category or Document
- **4. Send:** Send selected report to user's BusinessObjects Inbox.
- **5. More Actions:** Copy and paste the link to share the folder.
- 6. Details: Display report summary.
- 7. Refresh Navigation Panel and List Panel
- 8. Page Navigation

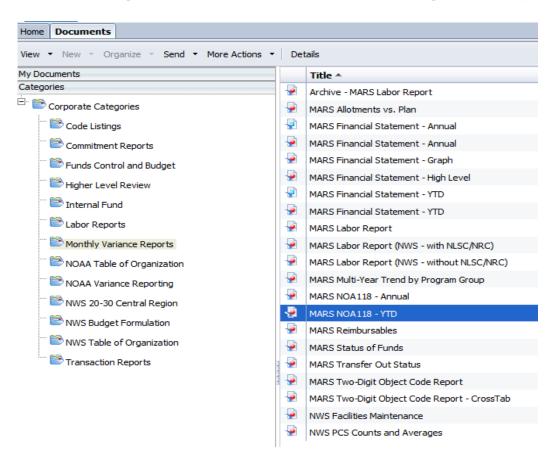
## Launch Pad Navigation: Document Icons

 Documents other than BusinessObjects documents can be viewed in Launch Pad and discerned by their icon or type description.



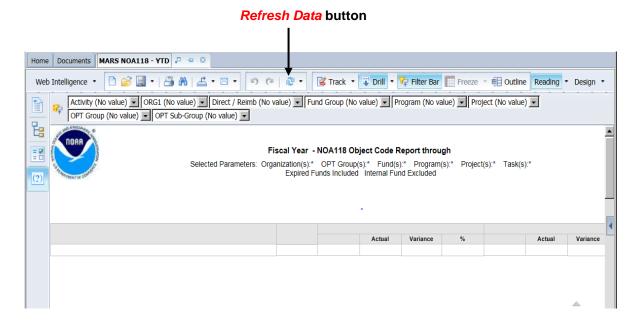
## Working with Documents

## Working with Documents: Using a Corporate Document



- In this exercise we will show you how to use the MARS NOA118 – YTD corporate document.
- Be sure you are in Category view for this exercise.
- Click on the Monthly Variance Reports Category.
- To view a document, simply click on the document name in the List Panel.
- Or click on View on the Launch Pad toolbar.

## Working with Documents: Refreshing Data



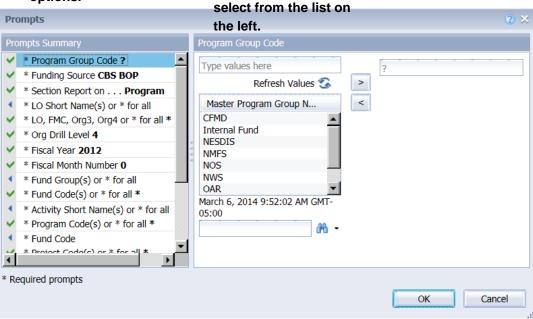
- The MARS team purges the query data before publishing reports.
- Therefore, when a corporate document opens, the report tabs will have no data in them by default.
- The user must click the Refresh Data button to retrieve the desired data.
- Upon refresh, the user may be prompted for parameters for retrieving the data.

Click Refresh Data

## Working with Documents: Filling in Prompts

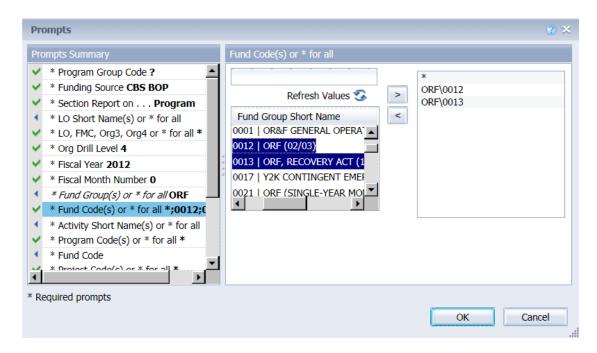
Type in value here or

Highlight the prompt to be answered. See below for options.



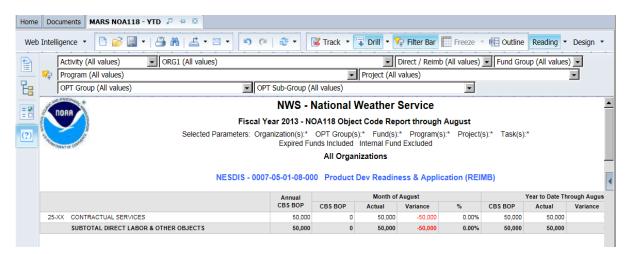
- Default values have been filled in to the prompts.
- The user will need to change any prompt that has a question mark (?).
- The user should review all other prompts to be sure only the necessary data is retrieved.
- You may need to scroll down to see all the prompts that are available.
- To change a prompt value, click on the prompt in the upper part of the screen and either type in the desired value, or select it from the list of values in the lower part of the screen
- If the list of values is empty, click the Refresh Values button.

## Working with Documents: Filling in Prompts



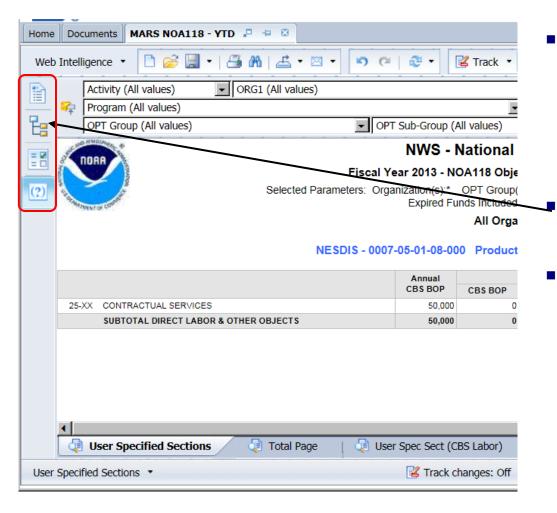
- Some prompts allow the user to select multiple values or '\*' for all.
- If the user does not want all values, highlight the desired values in the list at the left, click the > button to move them to the selected values on the right.
- Be sure to remove the '\*' from the selected values if you do not want all values. Use the < button to remove the '\*' or any other undesired items.</p>
- Click OK when you have finish selecting the desired values.
- Most documents will finish refreshing in less than 60 seconds.

## Working with Documents: Navigating Within a Document



- The document should now have the desired data.
- If the report is still empty, click on Refresh Data again and carefully review the values entered in the prompts for potential mistakes.

## Working with Documents: Navigating Within a Document

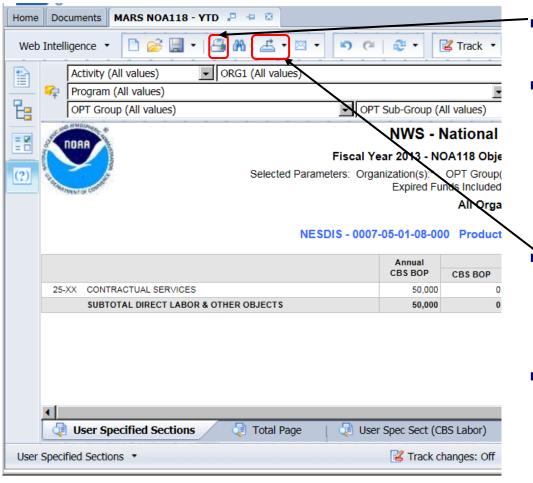


- There will be a panel to the left of the report. This panel is used to show the following features:
  - User Prompt Input
  - Navigation Map
  - Input Controls

The icons of the left panel control which feature you see.

The last feature you used will show as default.

## Working with Documents: Printing \ Exporting a Document



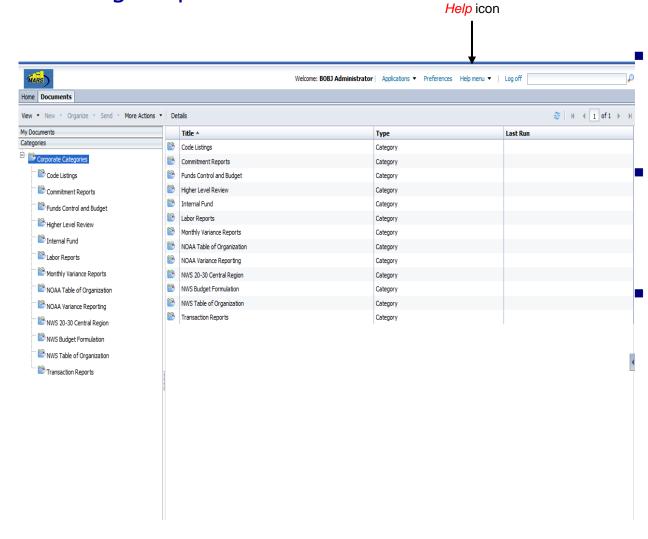
To print, click on the **Export to PDF for printing** icon on the menu bar.

A PDF file of the entire document will be generated, click the **Open** button to display the document in Adobe Acrobat reader. In Adobe Reader, click the **Printer Icon** or Select **File | Print** from the main menu as per a normal windows program.

To Export, click on *Export to my Computer* icon (to save the entire document or save only the current report tab) to my computer.

 You can then select; Excel, PDF, CSV or Text format for the exported file.

## **Getting Help**



This Querying & Reporting User Guide only brings you through the basics of using BusinessObjects.

We encourage users to explore the broader functionality of the product by reading the online help.

To get access to these resources, click on the *Help* icon from the *Main Menu*.

## Training Material available (See on the MARS Portal!)

- Webinar—Recorded step-by-step demonstration video, tailored to MARS users.
- The "Business User" Guide This guide conveys basic concepts and step-by step directions for:
  - system log-on
  - system navigation
  - viewing and refreshing reports
  - saving reports
  - sending reports to other users
- The "Power User" Guide This guide conveys more advanced concepts and step-by step directions for:
  - Creating Webi Documents
  - Filtering Document Queries
  - Report Formatting
  - Advanced Report formatting
  - Analytic Features
  - Cross-tab Reports
- Web-Based Reporting Module Training via Knowledge Accelerator Knowledge Accelerator is a web-based training tool that simulates use of the reporting and querying module. Knowledge Accelerator provides the user with an understanding of how the screens flow and provides the opportunity to practice processes/operations in the tool (e.g., opening a report, refreshing a report, etc.).

## MARS Support Information

- Hours: Mon-Fri 7:30 am 5:30 pm EST
- Contact Information
  - □ Email
    - mars.support@noaa.gov
  - □ Phone
    - **(301) 427-8888**
  - □ Fax
    - **(301) 713-1742**